

VALUES, NORMS AND POVERTY
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SESSION II: VALUES, NORMS AND MEASUREMENT IN THE WORLD
DEVELOPMENT REPORT ON POVERTY AND DEVELOPMENT

VALUES, NORMS AND MEASUREMENT: MAIN ISSUES

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**SESSION II: VALUES, NORMS AND MEASUREMENT IN THE WORLD DEVELOPMENT REPORT ON POVERTY AND
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The World Development Report 2000/2001 is based on two trilogies¹: on the one hand, the analytical framework of empowerment, security and opportunity, and on the other, policies operating through assets, markets and institutions. The Report starts with an introduction on the nature and structure of poverty. This opening chapter focuses on the multidimensional character of poverty which, in addition to income and consumption, also encompasses risk, vulnerability and powerlessness, as the poor themselves strongly assert whenever they have a voice in the matter. This is why the Report attaches great importance to the perceptions and experiences of the poor. The multidimensional character of poverty includes norms and values, the referents of which vary according to the societies. Furthermore, it is necessary to base these policies on the communities themselves and to take ethical and faith values into account. Despite variations according to the societies in question, the poor themselves express series of commonalities, as in the declarations of the international community, both in terms of reflection on values as well as strategies for empowerment, security and opportunity. These different dimensions are not easy to translate into indicators. Some of them emerge as lead indicators, such as health, education, decision-making, consumption and income, risk and vulnerability. In the first part, mention is made of the concepts and definitions of poverty as analyzed by the social sciences and the poor themselves. The second part refers to the debates on concepts of norms, institutions and values, their commonalities and their relationship to development. The third part describes how poverty is measured, already the subject of a vast literature, together with the different indicators possible.

1. Perceptions of poverty: the voices of the poor

1.1. The concepts of poverty in the social sciences

The various social sciences: the conditions for integrating several disciplines

Each social science has a different definition of poverty, highlighting its own interpretation. The disciplines differ through their concepts and the types of causality they favour: economics, sociology, anthropology, political science or moral philosophy. Certain topics are covered by mixed disciplines, such as normative economics, political economy and institutional economics. Modern economics has been impoverished by the distance created between economics and ethics (Sen 1987b, p. 7).

Justice, welfare and poverty in literature

There are different theories about distributive justice or normative economic theories. The so-called welfarist theories, dominating what is known as welfare economics, which has utilitarianism as its origin, centres on utility or satisfaction (with the problem of interpersonal comparisons of utility). Criticisms of welfarism have been the much-discussed subject of a vast literature. Among the theories opposed to utilitarianism, besides libertarians placing the emphasis on rights, certain views consider that an egalitarian concern is indispensable, and that social justice does not consist in distributing the results but in creating opportunities for individuals (Fleurbaey, 1996, p. 19). They advocate equality of the means used to satisfy preferences. J. Rawls (1971) refers to these means as "primary goods": basic liberties, freedom of movement, the capacity for autonomy and responsibility, income and wealth, and the social bases for self-respect. Rawls conceptualizes justice as fairness. One of his two major principles is that social and economic inequalities should be organized for the benefit of the worst off individuals and attached to positions and functions open to everyone (fair equality of opportunity). A just society can be judged according to the way it treats the worst off individual. However, this concept is centred mainly on outcome and not on the rules of the game and processes (Stiglitz 1998a).

¹ The author would like to thank Anne Case for her precious comments and suggestions during the meeting; naturally the usual caveat applies.

A. Sen does not advocate equality of means but equality of capabilities, i.e. functionings: a functioning is an achievement, whereas a capability is the ability to achieve (Sen, 1987a, p. 36). Poverty is the failure of basic capabilities to achieve minimum acceptable levels. The advantage of an individual is her freedom to carry out the functionings she values. These functionings can vary from those that are elementary and physical (avoiding a premature death or a sickness that can be prevented, being adequately nourished, clothed and sheltered) to more complex achievements (taking part in community activities, leading a happy and stimulating life, respect for oneself and for others, Sen 1998, p. 7). Poverty is inadequacy of income - not incorporated in poverty lines - rather than a low income (Sen, 1992, pp. 110-111). The conversion of income into basic capabilities varies widely between individuals and between societies. The capacity to achieve the minimum acceptable levels of basic capabilities is accompanied by different levels of adequate minimum incomes, depending on personal and social characteristics.

The weight to be given to aspects of welfare varies utility (welfarism), income (the monetary equivalent of utility) and capability (biblio). The accent is also placed on rights, dignity, the capacity to participate fully in social life, with destitution being the consequence of an allocational failure (Dasgupta 1993, p. 19). Poverty has different components, starting with private consumption, followed by access to common property resources, state-provided commodities, then possession of assets as a protection against destitution, and finally dignity and autonomy (Baulch 1996a). It includes insecurity, powerlessness, isolation, and vulnerability to violence. It is the result of a lack of access to social services; of entry barriers to various markets, credit and labor; and of deficits in physical, human and social capital (e. g. exclusion from transfer circuits in traditional societies). The reasons for poverty are due to characteristics of population, work, nutrition, owned assets, especially land, education, health, as well as regional (rural or urban) features (Lipton 1994). Belonging to certain ethnic or other groups is another factor. These characteristics create problems of causality; they can be linked causally to poverty traps (income, health, gender, education, ethnic origin, etc). Absolute poverty can be distinguished from relative poverty. Poverty, a more static concept, can also be distinguished from vulnerability, a more dynamic concept. The poor are usually among the most vulnerable, but not all vulnerable individuals are poor. A distinction should be made between the chronically poor and the temporarily poor. These concepts of poverty can be distinguished from exclusion, a social act of ostracism.

1. 2. Diversity of perceptions: participatory assessments and “voices of the poor”

Anthropological studies have already shown the strengths and capacities of the poor, confirmed by Participatory Poverty Assessments (PPA). PPAs show that, in some domains, the poor are capable of carrying out complex assessments of poverty and of analyzing solutions in terms of policy. The poor are able to identify their problems: adequate food, health and secure livelihoods linked to the supply of basic services such as water, roads, transport, healthcare, education, access to financial services, productive inputs and markets (Brocklesby and Holland 1998, p. 25). The examples are numerous. Discussing the villages of West Bengal, Tony Beck (1995) demonstrates that the poor fight for respect and resources. The PPAs change the way in which the poor are conceptualized, too often in a negative way. The concept of poverty is perceived differently depending on the societies, membership group, gender, geographic area and urban-rural environment. In the Côte d'Ivoire, the poor do not perceive poverty in terms of income only but also under other aspects: uncertainty, insecurity, exclusion, vulnerability, powerlessness, precarious property rights. The rural poor of Zambia are defined as having numerous mouths to feed, with a woman heading the household, or having a head of household without access to traditional means of support, who is uneducated, without assets of a sufficiently high quality, and in a state of personal insecurity. Relative deprivation also exists for the middle classes who consider themselves to be poor if they are unable to maintain a certain standard of living (Bevan and Ssewaya about Uganda 1995, p. 22). In Ghana, surveys make a distinction between those who do not have access to certain goods and services, and those who depend on transfers from the community, a situation which is not perceived as poverty as long as it is transitory. In Kenya, poverty is felt more acutely in urban environments, a subjective perception that is out of line with the results of quantitative surveys which maintain that poverty exists mainly in rural areas. In certain villages in India, a recurrent theme is the importance of personal dignity; the poor want land because it implies freedom from hunger and ties to a patron, as well as self-respect (Jayaraman and Lanjouw 1998, pp. 29-30).

The PPA of South Africa (mostly based on the rural poor) reveals a coherent perception of poverty. The main features of the poor are isolation, infant malnutrition, overcrowded housing, energy insecurity, lack of jobs within a household, and separation of families. Here, poverty encompasses several dimensions and refers more to the idea of “well-being/ill-being” rather than “wealth/poverty”. The poor have a strong perception of

vulnerability, i.e. the dynamic aspects of well-being. The main asset deficits leading to poverty traps are lack of opportunities (“poverty of opportunity”, since individuals are incapable of taking advantage of the few assets available to them); barriers created by institutions, and the roles of power and gender; barriers due to the absence of resources, particularly money; barriers created by segmented labor markets, goods markets (transport), information, a violent environment, and lack of time (“time poverty”). The limited options available to the poor constitute poverty traps (SA-PPA 1998, pp. 38; 100-109). Apart from differences between societies, this PPA illustrates the importance and recurrence of common problems concerning empowerment, security and opportunities.

2. Values and poverty

2. 1. Norms and institutions

The institutions are the humanly devised constraints that structure political, economic, and social interactions (North 1991, p. 97). They consist of informal constraints (sanctions, taboos, customs, traditions, codes of conduct) and formal regulations (constitutions, laws, property rights). They take the form of regulations as well as ethical and behavioural norms (North 1984, p. 8). Regulations and norms can be either formal or informal, and they can have opposing or congruent goals and values. Social norms are standards of conduct, and they differ from cultural norms which are standards of belief based on ethical codes (Hayami 1998, p. 3).

Development can encourage norms that are efficient and more or less egalitarian vs discriminatory in their distributive implications (Young 1998, p. 821). Norms can reflect the preferences of interest groups (Weiss and Fershtman 1998, p. 815). They may or may not move towards improving social justice, as in the case of education where cultural norms frequently slow it down. Norms can regulate excesses of poverty or wealth, and help to reduce inequalities, as well as they may create discrimination and exclusion. Social norms can be either opportunities for, or obstacles to, well-being; legislation can in that case modify these norms if they diminish autonomy, for example, by discouraging individuals to educate themselves or to expose themselves to different concepts of good (Sunstein 1997, p. 36). Institutions facilitate collective action but also encourage the maintenance of the status quo. Individuals can follow norms from which they derive no benefit, and poverty can perpetuate passiveness and social withdrawal (Johnson 1997, pp. 20-23, quoting Berry 1989b, pp. 49-51).

2. 2. Values, ethics, commonalities

The reconciliation between justice, ethics and the diversity of social and individual perceptions is an old question. There are two distinct approaches to values: ethical values which the social sciences may adopt vis-à-vis poverty (normative level), and values defining societies, which are diverse but include the minimum, universal and ethical principles (descriptive level).

What are the universals of well-being?

What is looked upon as deprivation varies from one society to another, but the existence of social variations does not prevent various agreements. There is consensus on the importance of certain functionings and corresponding capabilities (Sen 1992, p. 108) and on the existence of capabilities (for example, participating in community life) rather than on their particular form. Poverty is more of a capability failure than a deficiency in satisfying needs for pre-specified goods (acting freely, being capable of choosing, having self-respect, with more concrete functionings such as health and adequate food). These are intrinsically valuable functionings in all cultures but the goods they require vary.

Rationality and relativism: the commonalities of values

The diversity of perceptions does not imply incommensurable worlds of communication. Rawls (1993) supports a position against moral relativism by defining universalism with reference to a limited field of ethical questions, one relating to the justice of social practices. As for the other components of moral life, each society contributes its own solutions. Divergences in terms of ethical values are also the result of the scale variations of the group to which are applied the norms defining it. Attaching importance to the “agency” of a person (respecting her capacities to form commitments and values, which cannot be restricted to her well-being alone) does not impose a subjectivist view of ethics, nor does it value unconditionally the values of a person (Sen 1978b, p. 42). There are “moral minima” whatever the culture concerned. Even if there are different conceptual schemes, all the interpretations of the world are not equally valid and incomparable. Common human traits include mortality, the

body, pleasure and pain, cognitive capability, practical reason, early infant development, affiliation and humour (Nussbaum 1993, p. 264).

Ethics in development

The literature about the ethical preoccupations of development is increasing, particularly with reference to its creative and destructive effects on values, and its role as a generator of value conflicts on notions such as a just society (Goulet 1992). The concept of development is "value-relative". The identification of values as an instrument for, or as an obstacle to, development is still insufficient, and an evaluation of such values is therefore necessary (Nussbaum and Sen 1989). Development should improve the quality of life by respecting demands for social justice and freedom, by ensuring the participation of groups not belonging to élites, by strengthening capabilities as empowerment (Martha Nussbaum), and by recognizing the existence of "prudential values" shared by all human beings (James Griffin, quoted in Qizilbash 1996, p. 1216).

Collectivist or individualist societies

It has been possible to analyze certain societies as being "collectivist" vs modern and individualist. The differences between collectivist and individualist societies arise from the formation of values and norms adapted to different ways of organizing transactions (Greif 1994 on Maghribi traders). Traditional societies display a "moral economy" in which economic transactions are embedded in social relations vs modern societies in which money is autonomous. There are different scopes in the systems of altruistic values: e. g. limited (traditional societies), relating to everyone, or to members of a religion. Two trends can be found in modern individualism: the central role of the individual in the hierarchy of values, and autonomy of the economic sphere.

2. 3. Values, development and poverty

The role of values in development

This is a question of the relations between values, rationality and efficiency. Certain values are efficient (they limit opportunist behaviour and reduce transaction costs) while others lock societies into inefficient and even dysfunctional systems. Institutional changes must be consistent with existing cultural norms and beliefs. Do certain systems of norms and values encourage or slow down development; do they accentuate or attenuate poverty? This question depends on the definitions of development and poverty. Development is a movement which starts from traditional modes of thinking and moves towards modern forms which value change; it depends on competition, the setting up of effective institutions and the functioning of organizations, as well as the process of decision-making, i.e. voice and participation (Stiglitz 1998b, p. 15).

Equality and inequality

All societies, including developed ones, build up various social ethics relating to poverty and wealth. Certain societies give more priority to equality, others to hierarchies. Some condemn excessive accumulation or resort to disincentive regulations with respect to the acquisition of wealth (for example, rules governing inheritance), or regulations which generate marked inequalities, by restricting access to resources to the majority. The possession of wealth can be offset by significant redistribution imperatives. Certain countries have very marked inequalities (Brazil is one example). A current trend in economic literature is to assess the negative impact of such inequalities on growth.

Agricultural societies can be very stratified, despite the value of reciprocity, through kinship systems, even if these inequalities are not expressed in terms of income. One of the issues is to determine whether access to monetary resources increases inequalities or not. What differentiates societies is the organization of the different levels giving rise to the question of inequality vs equality. Among the Aborigines, for example, economic inequalities are not developed, but they are inegalitarian because each person is born dependent on his elders (Testart 1989, pp. 11-12). Equality can be treated differently in terms of values (egalitarian) and facts (inegalitarian). There can be tension between equality and hierarchy within the same society. In the Pacific, for example, egalitarian societies display a competitive equality; this means that equality must be justified, and to be an equal is a costly task requiring continuous efforts (McDowell 1990, p. 183). In a context of poverty and competition for resources, the perception of signs of inequality can lead to lowering the standard of living, and preventing collective action and solidarity, a means of protection against inequalities introduced by the market. Development runs counter to this type of traditional regulation of inequalities.

Developmental values

Sociological literature has asserted that certain societies exhibit the ingredient values of development: effort, altruism, sense of general interest and community. Explanations through culture should be handled with precaution (for instance, the culture of poverty of the sixties). The poor do not form a homogenous sociological group, but seek to escape from their poverty and accurately identify the causes. Certain countries have nevertheless been able to develop by having their own values, for example, in Asia (although Asian values are not the reason behind Asian success). The lesson is in the negative mode: European culture is not the only path towards successful modernisation (A. Sen, *Le Monde*, 27 October 1998).

Discriminations and entry barriers

All societies discriminate, some more subtly than others, for instance the Western egalitarian societies (discrimination through diplomas, birth). Certain societies are based on status discrimination. This can concern the status of birth (affiliation) which cannot be transferred or negotiated (gender, caste, occupation, membership of an ethnic, racial or regional group), or it can be linked to the hazards of life (sickness and handicaps). Discrimination may also be based on a status of ascription which is negotiable, transitory, acquired (by profession, marriage, conversion to a religion) or associated with the life cycle (the younger generation, the elderly, the unmarried). Those who suffer from discrimination are also characterized by an absence of voice and participation, as well as exclusion from decision-making. The instruments of discrimination vary according to the societies in question. Regulations (on inheritance, for instance) can bar access to certain assets, an example being women who have no access to land. This type of discrimination is a factor of vulnerability and it can lead to poverty traps. Such stigmatization (which can easily turn into an act of violence) is an indicator of social tension and it disadvantages the poor.

Assets

Structural poverty can be distinguished from conjunctural poverty (Iliffe 1987). Structural poverty is a long-term poverty of individuals (the consequence of demographic hazards, lack of relatives, deaths in the family, family migration, and hazards connected with health, disability and age). This type of poverty is not family poverty but is due, rather, to the lack of a family. There are two forms of structural poverty in terms of assets: poverty in societies where there is an abundance of land and where the poor are typically those deprived of labour resources so that they are unable to derive benefit from the available land, and poverty in societies with a shortage of land, where individuals are obliged to sell their labour in markets offering wages lower than their subsistence needs. These types of poverty give rise to strategies to ensure the safety of assets, such as descendants, in contexts marked by uncertainty. Poverty can consist of insecure property rights or a shortage of social claims for the future (social debts). The ownership of assets such as land is a determining factor, for example in India as well as in Sub-Saharan Africa, where access to land maintains social affiliation; conversely, social identities (gender or generation) serve as a vehicle for access to work, capital, knowledge, authority and land (Berry 1989a, p. 2). A marked inequality of assets is a feature of rural societies. Time is also an asset since heavy constraints in rural societies hinder activities, such as education, which can save people from poverty. The time constraint weighs particularly heavily on women. The level of free time, combined with education, can even constitute a social indicator of the greatest poverty of households headed by women (Appleton 1996).

Social capital

One of the major risks affecting the poor is a high variance in their income which they seek to smooth. In societies without a system of state protection, poverty can be defined as a lack of access to insurance, risk coverage, social capital, relatives, children, dependants: poverty in claims, and exclusion from the circuit of social debts and obligations. There are two types of insurance: vertical and inter-generational, with children; and horizontal, with anticipation of returns within the life cycle which can eventually be transmitted. Remittances among members of a household also contribute to reduce inequalities in income. These individual insurances can turn out to be ineffective at group level, by levelling out individual accumulations, by not providing the expected insurance because the network in question has sunk into poverty, or because the individuals are already too poor to deprive themselves in the present in the hope of future returns. An example is the population-poverty relationship (Dasgupta 1995): rising population is the result of individual calculations on the optimal number of children, and ends up in a collective failure. Unstable environments push people to multiply the acquisition of networks, which could be costly and lead to impoverishment. The notion of social capital is now the subject of extensive literature, and its measurement is improving.

3. Indicators and measurement of poverty

3.1. Indicators

“Absolute” approaches contrast with “relative” approaches. Each index has its strengths and weaknesses, involving conceptual problems: how to weigh needs, and how to select the pertinent unit (individual or household) and period of time (year or life cycle). Measures of poverty are determined by social values concerning levels of consumption, services and other aspects of life considered to be the necessary minimum. These norms vary according to the societies, and tend to rise with the level of material well-being. Most indicators are one-dimensional, covering monetary poverty only, for example. Poverty is usually measured by observing whether the level of “receipts” of an individual has fallen below the norm (goods consumed per person and per year), as well as requirements and the conversion capacity of receipts into requirements (example of the relationship between nutrition and poverty, Lipton 1994, p. 1).

Monetary or income-expenditure measures

The literature on this topic is vast and the most frequently recurrent notions, besides the indices of inequality, are briefly enumerated. The evaluation of poverty is based on the establishment of poverty lines which can be absolute or relative. The most commonly used method determines certain basic consumption needs, the most important being food expenditures (or nutritional needs), followed by non-food expenditures (Ravallion 1994). The most known measures are the headcount index, the poverty gap index (income deficit in relation to the poverty line), the severity of poverty index which takes into account inequality among the poor (like Sen’s or Atkinson’s indices) (Foster, Greer and Thorbecke 1984). These indices form a set of generic measures (*Pa* indices), in which the more *a* rise, the more the measure is affected by the level of the well-being of the poorest person. There are several measurement methods (e. g. food-energy-intake or cost-of-basic-needs) which do not produce the same poverty lines (Ravallion and Bidani 1994). International poverty lines, such as one dollar a day (1985 PPP, Purchasing Power Parity) - or two dollars for intermediary income countries - are designed for international comparisons.

Synthetic indicators

Among these are the PQLI (Physical Quality of Life Index) of D. Morris, or the UNDP indices (e. g. the Human Development Index). There are also deprivation indicators to synthesize the lack of certain items in a given lifestyle: income has an influence but there are also other variables (lasting unemployment, lack of savings, etc., Nolan and Wheelan 1996).

Non-monetary social indicators

The most frequent social indicators relate to health (infant mortality); levels of schooling and literacy; access to education, health, and drinking water; quality of education and health; and food security. One can distinguish capability poverty, consumption poverty, lack of wealth and lack of empowerment (exclusion) (McKinley 1996, UNDP). The capital (or assets) indicator can include physical capital, land, housing, savings, human capital, social capital, and debts. One should also add free time, a factor which distinguishes men from women. Social rights and obligations are also assets which are exercised in an intertemporal way. These rights do not relate exclusively to the community but are broader, and include political and civil rights, as well as access to decision-making at local and national levels. One problem is to construct indices showing the dynamics of poverty, such as the level of indebtedness (both monetary and social), which reveal vulnerability, and rights and obligations (property rights, inheritance). One should also include geographic capital (spatial poverty traps). What is the causality between these different indices: are they the effects or the causes of the process leading to poverty?

The above-mentioned indicators can be referred to as “objective”, and the following ones as “subjective” (Baulch 1996b, p. 36). Sen (1992, p. 102) proposes another distinction, identification (who are the poor?) and aggregation (what is the overall level of poverty?). The subjective approaches, based on the link between subjective minimum income and real income, were made popular by subjective poverty lines. They can be criticized for being too sensitive to the formulation of questions and the risk of over-estimation. There is a partial correspondence between subjective measures and conventional “objective” measures (Pradhan and Ravallion 1998).

Qualitative indicators are founded on sociological and anthropological approaches and take better account of the diversity of perceptions of the poor, especially participatory approaches and rapid surveys (Rapid Rural Appraisal and Participatory Rural Appraisal, Chambers 1994 for example). Qualitative approaches are not all participatory, and some participatory techniques can be quantified. There is a large variety of them, placing the

emphasis on social capital, social status, and phenomena of exclusion. The optimal strategies are to integrate both the quantitative and qualitative approaches since they are complementary. Studies on European countries have demonstrated that depending on whether poverty is defined in monetary or subjective terms, or according to the relative social minimum (fraction of the population living under the most difficult conditions, poverty of existence), the correlations are positive but weak. These studies clarify three different aspects of poverty and show its multidimensional nature (Lollivier and Verger 1997).

Problems pertaining to the construction of indicators

Indicators express values, choices and normativity. One problem is the construction of discontinuous categories, despite the fact that poverty can be considered as a continuous and multidimensional phenomenon (a discussion of measures can be found in Lipton and Ravallion 1995). Lipton (1997) points to the problems relating to measures in PPP and the food-energy method, or shows that the measure of the severity of poverty is unsatisfactory. The results can be sensitive to the poverty line chosen, to the sources of information on prices, or to the design of the questionnaires. The problem posed by measurement is important because the choice of an indicator for the standard of living influences policy assessments. Another problem is to make international comparisons (analogies between inter-personal and international comparisons). Per capita income is not a sufficient indicator of aggregated well-being (Dasgupta and Weale 1992). International comparisons are often sensitive to conventions identifying poor households. Their results can differ according to the choice of the poverty line, the equivalence scale, or the indicator for measuring poverty (Chambaz and Maurin 1997).

3. 2. Multidimensional indicators of poverty

The causalities and vicious circles existing between the different dimensions of poverty, monetary poverty, living conditions, unequal opportunities and discrimination, with the resulting simultaneous accumulation of deprivation, need to be analyzed. The difficulty is to measure a multidimensional phenomenon using indicators designed for specific questions. Another issue is the robustness of the indicators other than monetary/consumption ones. Attempts to extend poverty indicators beyond the measurement of food-consumption-income have proved to be difficult (Lipton 1994, p. 2). Income remains a relevant indicator. Social - health and education - indicators are linked to income but not completely (Lipton et Ravallion 1995).

A multidimensional analysis of poverty requires a series of supplementary indicators. The income-consumption indicators can, when the data permit it, include differences in allocation within a household (certain members are in that case poorer than they appear to be). Risk and vulnerability indicators should be included (variability of consumption, health risks, and level of social violence). Social capital can be measured (Narayan and Pritchett 1997; Grootaert 1998). One can add indicators of empowerment (political participation, civil liberties), access to decision-making at local and national levels, and indicators of social tensions: for example, institutional capacity for conflict resolution (Rodrik 1998), ethnic conflicts, crime and violence.

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